



Software Help Sheet 4: Building Rosters to Record Non-Meal Service Deliveries

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What is a Roster?

Entering service deliveries one consumer at a time is extremely inefficient. SAMS *Rosters* were designed to encourage efficient service data entry.

Rosters are custom, filtered lists of consumers displayed in a spreadsheet fashion. By selecting large numbers of consumers at once, users can enter service deliveries quickly for many consumers.

This Help Sheet is designed to show how to deliver *non-meal services*.

Using Rosters

Using rosters in SAMS is a two-step process:

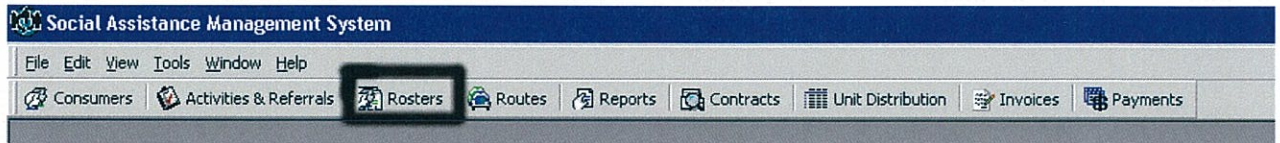
- 1) Creating a *Roster Definition* and then
- 2) Recording service deliveries.

Step One: Creating a Roster Definition

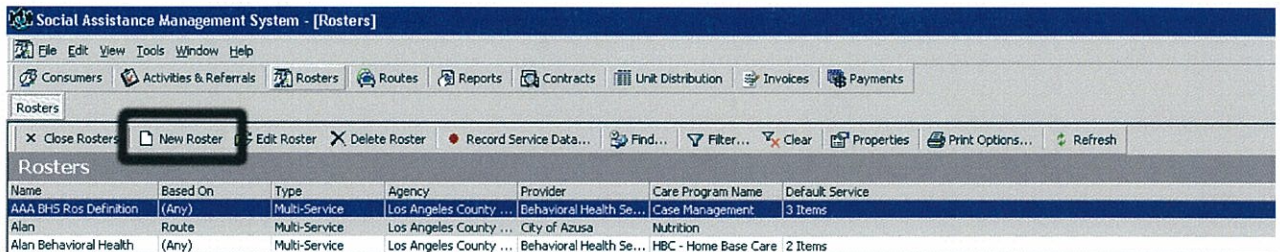
This step involves telling SAMS who you would like to deliver services to.

Hint: Once a Roster definition has been built, you may use it each month to deliver services to your consumers.

1. In SAMS, Press the **Rosters** button.

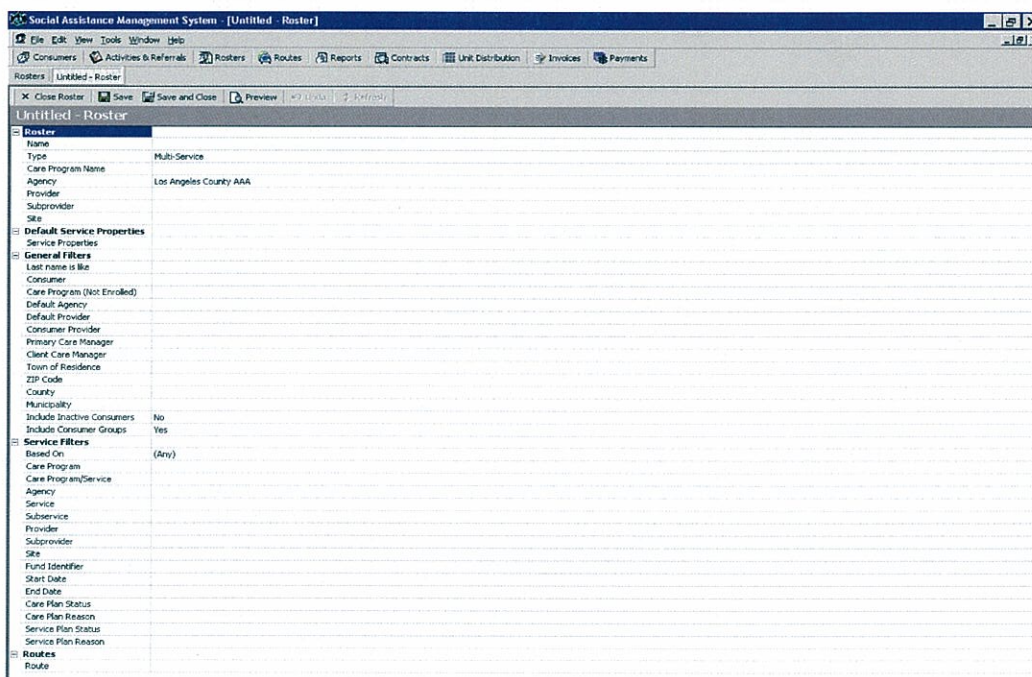


2. Once into the Rosters area, press the **New Roster** button.



3. The New roster screen looks like the screen below. As mentioned before, this screen is where you define who you would like to deliver Services to. This screen is commonly called the Roster Filter screen.

Hint: Use as few Filters as possible to build your Rosters.



Creating a Multi-Service Roster Definition for Non-Meal Services

This type of Roster allows you to deliver any Non-Meal type of Service. You can build separate rosters for each Service you deliver if you wish, but this example shows how to build a Roster for delivery of multiple services at once.

Month One Roster Definition

The Roster screen below shows (in yellow) the fields that must be filled in the first month you deliver services. The next few pages have a detailed explanation of each of the fields involved.

Social Assistance Management System - [Untitled - Roster]

File Edit View Tools Window Help

Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Rosters Untitled - Roster

X Close Roster Save Save and Close Preview Undo Refresh

Untitled - Roster

Roster

Name

Type Multi-Service

Care Program Name

Agency Los Angeles County AAA

Provider

Subprovider

Site

Default Service Properties

Service Properties

General Filters

Last name is like

Consumer

Care Program (Not Enrolled)

Default Agency

Default Provider

Consumer Provider

Primary Care Manager

Client Care Manager

Town of Residence

ZIP Code

County

Municipality

Include Inactive Consumers No

Include Consumer Groups Yes

Service Filters

Based On (Any)

Care Program

Care Program/Service

Agency

Service

Subservice

Provider

Subprovider

Site

Fund Identifier

Start Date

End Date

Care Plan Status

Care Plan Reason

Service Plan Status

Service Plan Reason

Routes

Route

1. The Name Field

The Name field is simply used for naming your Roster so that you may find it on the list later. We recommend that you put your Provider name in front of every Roster definition.

Name Fill in the roster Name here. Example: Antelope Valley HBC Roster

2. The Type Field

The Type field tells SAMS what type of Roster you are going to use. SAMS offers four types of rosters: *Multi-Service*, *Service Plan (Multi-Service)*, *Service Plan (Specified Service)*, or *Specified Service*.

A *Specified Service* roster only records one kind of service to the list of consumers.

A *Multi-Service* roster can record different services to the same consumer list.

Service Plan rosters generate lists of consumers based on care plan service allocations.

Note: Since Care Plans are generally not required for any Services other than Home Delivered Meals, Los Angeles County Providers will *not* be using the Service Plan rosters at this time.

This means that when you're building your Rosters, you should choose either *Multi-Service* or *Single Service*.

3. The Care Program Name Field

SAMS requires the designation of a Care Program for each Roster. The Care Program is equivalent to the Care Enrollment designation on the Consumer record, as seen below:

Status	Status Date	Start Date	End Date	Care Program
Active	05/28/2008	05/28/2008		CBSP ACRC
Active	05/28/2008	05/28/2008		Legal
Active	05/28/2008	05/28/2008		Case Management
Active	01/01/2008	01/01/2008		Nutrition

Hint: Each Roster can only have one Care Program (Care Enrollment.)

For instance, if you wanted to deliver Case Management Services, the Care Program would be **Case Management**. If you were delivering Legal services, the Care Program would be **Legal**.

Care Program Name	Fill in the Care Program / Care Enrollment Here
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4. The Agency Field

The *Agency* field should always be filled in with *Los Angeles County AAA*, as shown below.

The screenshot shows the 'Social Assistance Management System - [Untitled - Roster]' window. The 'Roster' tab is active, and the 'Agency' field is set to 'Los Angeles County AAA'. The 'Default Service Properties' section is also visible.

Roster	
Name	
Type	Multi-Service
Care Program Name	
Agency	Los Angeles County AAA
Provider	
Subprovider	
Site	
Default Service Properties	
Service Properties	

5. The Provider Field


The *Provider* field should show your Provider name. Choose your Provider name from the dropdown list.

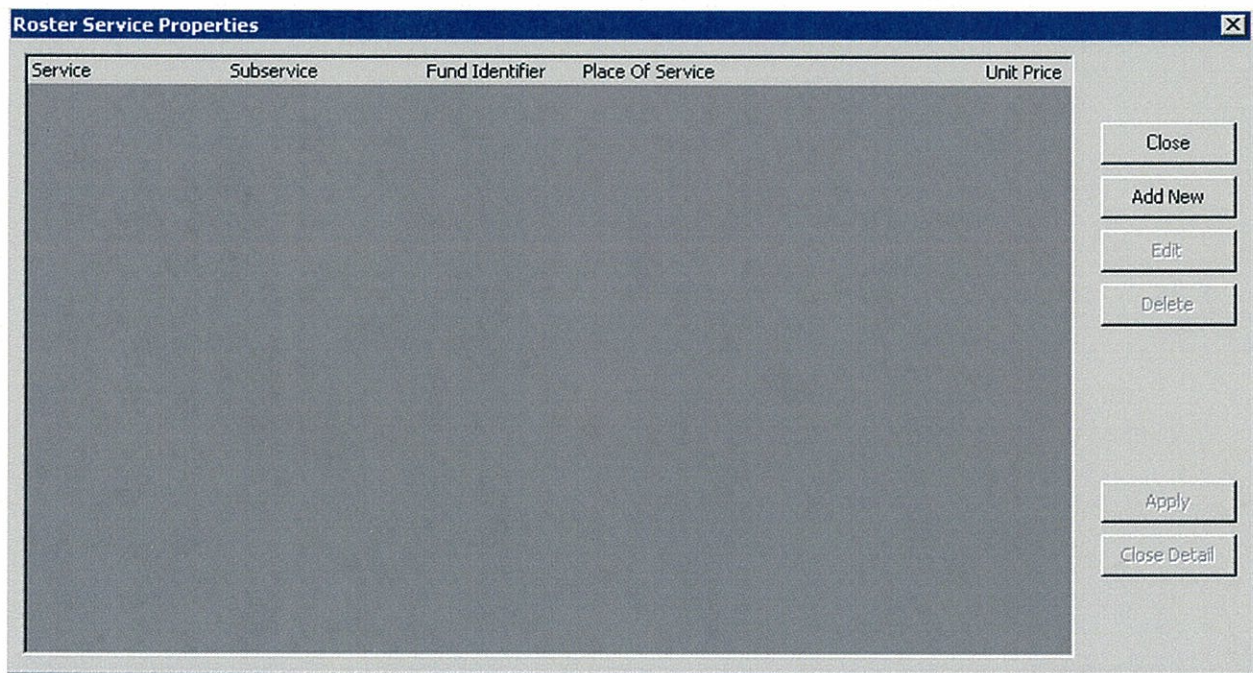
The screenshot shows the 'Social Assistance Management System - [Untitled - Roster]' window. The 'Provider' field is set to 'Alzheimer's Association'. The 'Default Service Properties' section is also visible.

Roster	
Name	
Type	Multi-Service
Care Program Name	
Agency	Los Angeles County AAA
Provider	Alzheimer's Association
Subprovider	
Site	
Default Service Properties	
Service Properties	
General Filters	
Last name is like	

6. The Service Properties Field

This field tells SAMS what Services you wish to deliver on the Roster.

- a. Click on the Service Properties field.
- b. Click on the grey box at the far right of the field. 
- c. The next screen is the Roster Service Properties screen. This is where you add the Services you wish to deliver.



Service	Subservice	Fund Identifier	Place Of Service	Unit Price
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Close

Add New

Edit

Delete

Apply

Close Detail

- d. Click the *Add New* button.

Add New

- e. After you click the **Add New** button, a new "Service Properties" Window will appear with additional options, as shown below. The two fields that you must fill out here are the **Service** and the **Fund Identifier** fields.

Service	Subservice	Fund Identifier	Place Of Service	Unit Price

Service Properties

Service: [Dropdown]

Subservice: [Text Field]

Fund Identifier: [Text Field]

Place of Service: [Text Field]

Unit Price: \$0.00

Close

Add New

Edit

Delete

Apply

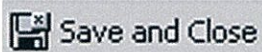
Close Detail

- f. After you add the first Service, click the **Apply** button.
- g. If you are constructing a Multi-Service Roster, click the **Add New** button again and repeat steps e and f again until all Services you wish to deliver are added.

- h. Click the **Close** button in the Roster Service Properties window.

- i. You will then be back at the main Roster Definition window. Check your work and press the

Save and Close button.



Note: You will need to press the **Refresh** button to see your Roster on the list.

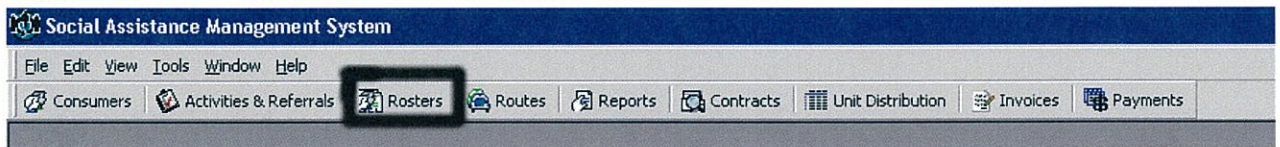
Month Two and Beyond Roster Definition

After you deliver Services for the first month, you will need to adjust the filters on the rosters you have built. The reason for this adjustment is to hold Consumers OFF from the Roster so that it doesn't get too long and difficult to manage.

We recommend that you adjust the filters to hold off any Consumer who has not received a Service Delivery within the past month. Adding these simple filters in month two and beyond will keep the list of consumers manageable so that it will not include people who have stopped receiving Services because they have passed away, or have moved.

Before delivering Services in month two and beyond:

1. In SAMS, Press the **Rosters** button.



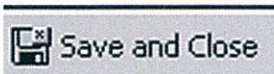
2. Find the Roster on the list and Double-Click into it.

The new filters we will add are under the *Service Filters* section:

Service Filters	
Based On	Service Delivery
Care Program	
Care Program/Service	
Agency	
Service	
Subservice	
Provider	
Subprovider	
Site	
Fund Identifier	
Start Date	
End Date	
Care Plan Status	
Care Plan Reason	
Service Plan Status	
Service Plan Reason	

- a. In the *Based On* field, Choose *Service Delivery*
- b. In the *Start Date* field, we suggest that you put the first day of the prior month.
- c. In the *End Date* field, we suggest that you put the last day of the prior month.

3. Click the **Save and Close** button.

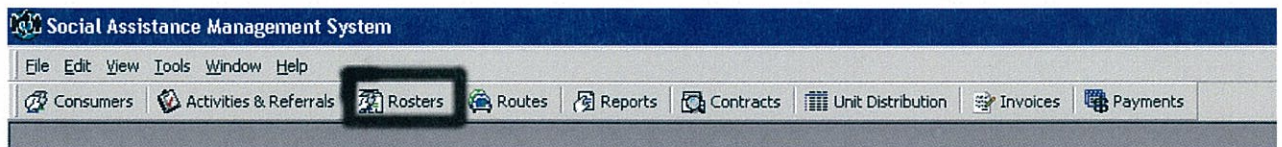


Each month, we recommend that you double-click on each Roster and change the *Start Date* and *End Date* fields, to keep your Rosters manageable.

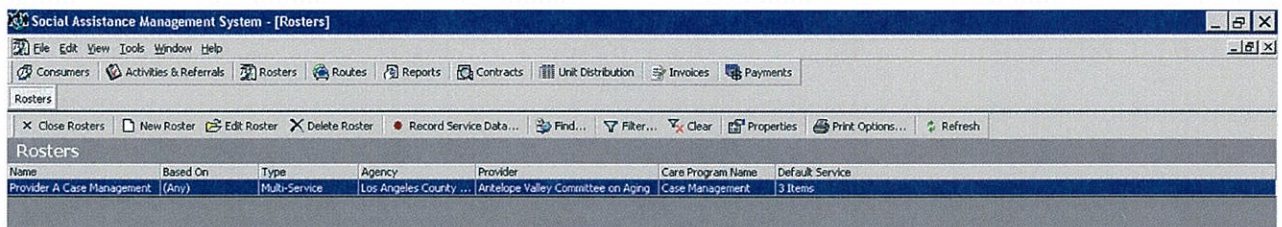
Step Two: Recording Service Deliveries

After you have built your Roster Definition in Step One, the next step is to Record your Service Deliveries.

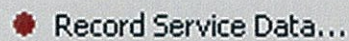
1. In SAMS, Press the **Rosters** button.



2. Highlight the Roster you wish to record services for as show below.
Do not double-click into the Roster.



3. Click the **Record Service Data** button.



4. In the next window, choose the month and year you wish to record services for.

The "Select Service Period" dialog box has a title bar with a close button. It contains a table for selecting the service period.

Service Period	
Month	October
Year	2008

On the right side of the dialog box are "OK" and "Cancel" buttons.

5. On the next screen you will be able to enter your Service deliveries in the appropriate day field.